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## The Open Scholarship Initiative Update

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# The Open Scholarship Initiative Update

*T. Scott Plutchak, UAB (retired)*

*The following is a lightly edited transcription of a live presentation given at the 2018 Charleston Conference by T. Scott Plutchak, Librarian, Epistemologist, UAB (Retired).*

How is everybody? Yes, thank you, good. Many thanks to Anthony, to Katina and the program committee for giving me a couple of minutes to do this quick update. I know that some of you in the room have been very involved with OSI, the Open Scholarship Initiative, over the last couple of years. Some of you know a little bit about it but aren't quite sure what's going on with it. Some of you have no idea what the hell I'm talking about. What I'm going to try to do in just about seven or eight minutes is give you a quick update on what OSI is and what we're trying to do and how you might be able to get involved if you are so interested. If I do my timing right, then Anthony will let us know if we have time for a question or two.

OSI is going into about our fourth year now. The core of it is the attempt to bring the broadest possible set of views and interests into the conversation. Much of the discussion about Open has taken place among librarians and publishers. We have a limited amount of power to actually change the system so we need to have a lot more people involved. OSI is concerned with all scholarship. This is not just about peer-reviewed articles. This is educational material, transparency, data, all of the aspects of scholarship; and not just science—the humanities and social sciences. We're trying to look at the whole thing.

OSI is not an organization. It's a project that was initiated by the National Science Communication Institute in collaboration with UNESCO. It is run by a loose group of about 30 people. I currently chair that group. We have a conference call once a month to try to move things forward and set some priorities. (On any given day I think that not only is it not an organization, it's actually a disorganization.) We've sponsored two conferences. These were by invitation. One in the spring of 2016, the second in the spring of 2017. We tried to bring in a diverse group of people, broke them into workgroups to actually try to dig down, over two or three days, into many of the different facets of scholarship, of how we're trying to advance things. The reports from those are

all available on the OSI website. They've been published by George Mason University Press. There's a lot of great stuff in there. If you're interested, I would encourage you to go and take a look. We then had a small group planning meeting last spring. Out of that planning meeting we recognized that there were four basic principles that seem to underpin the thinking of the various people who have been involved with OSI and that sort of shaped what it is we're trying to do. I want to go through those one by one.

So, obviously we all believe that more openness is to the benefit of society, openness across all of the aspects of scholarship; but with a change of this magnitude there are trade-offs. There are costs and benefits and we want to be clear about what those are. We want to be cognizant of the global impacts. We want to identify the potential unintended consequences and see how we can mitigate those. We need to have a better understanding of the economics so that we can try to be sure that those costs are distributed fairly.

We want to include everybody. All of the stakeholders, all of the voices, librarians and publishers of all types to be sure, but people in higher education, certainly researchers. We talk about researchers as if they are this homogenous group. Well, you all know that the research communities are many, many communities and trying to figure out how to bring them all into these conversations about Open has continued to be one of the challenges. We want to see what we can do by bringing in these diverse voices to help leverage the capacity of what existing groups are doing. And we really need to remember to work globally. There are fascinating and exciting things going on in South America, in Africa, in India where people have been working on open scholarship for a long time. They don't get enough attention from those of us in the US and in Europe and we want to make sure that those are listened to and that we learn from them better.

And it's all connected. We all know that you can't deal with getting faculty to publish in open access journals unless we deal with promotion and tenure. We have to figure out the research evaluation processes, all of these different pieces. If you push on one piece of the system there are going to be

impacts on other pieces of the system. We need to try to look at the whole thing globally and holistically.

And we've come to understand that Open is not a binary. It's not open or closed. It exists across a spectrum. A couple of the workgroups at the conference developed what we call the DARTS spectrum looking at an array of elements. When we're talking about Open we need to talk about these several different elements and try to see how we make something more or less open across these different facets.

So, the broad goals for OSI are to develop partnerships among all the stakeholders, conduct research so that we've got a better base in reality and we're not just dealing with advocacy and we're not just dealing with emotions, but we're dealing with the way the world is and not just the way we would like it to be. In the long run, we hope to develop some spinoff products and projects that will help make things better.

Tactically what we're trying to do includes hosting conferences like the two that I've mentioned. We're looking at trying to do some smaller regional things; in 2019 doing some things outside of the US. We spent much of the last six months developing a series of issue briefs, short papers that are designed to summarize the current state of some aspect of the

overall open scholarship landscape. The three that are listed there should be up on the OSI website and published by George Mason within the next month or so. We'll continue to maintain the OSI website as a clearinghouse and a resource for all aspects of scholarship. We have an e-mail discussion list, which you may want to follow and get involved with. We'll continue to participate in scholarly communication conferences like this.

If you want to learn more and if you want to potentially get involved, you can go to the OSI website. It's [OSIglobal.org](http://OSIglobal.org). The discussion list is closed, but we are happy to add people. You can track what gets discussed by going to the OSI website where you can see if the discussions are things you are interested in and would like to participate in. We've also got blog posts and, as I mentioned, the issue briefs are going to be up soon. You can go and comment on those. Anybody is free to comment. We would like to see more discussion and get more voices involved. If you want to find out more, if you want to get on the discussion list, you can flag me down. I'll be at the conference the next couple of days. Give me a business card, send me an e-mail, there's the website address. Glenn Hampson from NSCI is the program director. E-mail him, you can e-mail me and find out more, and that's my update.